

Enterprise Project Management Office (EPMO) – its.epmo@its.nc.gov

What is in this issue

From Initiation to Planning and Design – How to's.

Project Status Reporting

What constitutes a program?

Change Request Process

PPM tool changes

3 common PPM tool mistakes

EPMO Training

Business Analysis Boot Camp May 6-9, email john.mcshane@its.nc.gov

Requirements Gathering June 3-6, email john.mcshane@its.nc.gov

New User Training – April 15th, email charles.richards@its.nc.gov

PMP Prep Class October/November, email jesus.lopez@its.nc.gov

EPMO Team

Quality Assurance
Dick McGee
Shaw Erfani

Project Management Advisors
Alisa Cutler
Bob Giannuzzi
Jesus Lopez
Linda Lowe
Gaye Mays
John McShane

PPM Tool and Processes
Jim Tulenko
Charles Richards
Barbara Swartz

EPMO Director
Kathy Bromead

Please send feedback to its.epmo@its.nc.gov

What's New? – This is the first issue of a newsletter that we plan to distribute quarterly. Each issue will provide updates and information that will help you manage your projects successfully.

Initiation to Planning – How to

You put your project in the tool. The project is in initiation status. You are ready to go to Planning and Design. But your project has been in the tool for months with no project status reporting done. You are months behind in project status reporting. HELP!

What's New? We hear you. For a project in the initiation phase the resource hours

and cost are typically very low. Because of this, only one status report will be required for all of initiation.

How will it work? The agency project manager will work with the Project Management Advisor and send an email to the EPMD Director indicating the need for one rolled up status report for all of initiation. The EPMD Director will review and

approve. The project is sent through the Planning and Design Gate 1 approval. The project manager enters the status reporting data and will set the project to EPMD Quality Assurance (QA) review. The QA team will assess the initiation phase (the first status report) and then move the project forward to the beginning of Planning and Design.

Project Status Reporting/Gate Approvals

Many customers of the PPM tool struggle with navigation. It's also difficult to remember from month to month what information needs to be completed. Then, you have those gate approvals to worry about. The PPM tool is not as intuitive or user friendly as we would like.

What's new? Charles Richards, with the help of Dick McGee and Shaw Erfani, has developed a training class aimed at helping our customers with project status reporting. This is not the new user training, but a session devoted specifically to the monthly status reporting.

In addition, the EPMD and Methodology Group have completed Gate Approval Process guidelines. There are three levels, frequent tool users, intermediate tool users, and infrequent or new customers to the PPM tool.

How will it work? In the near future, you will see communication on the project status reporting class. We will initially focus this effort on the agencies with internal Project Management Office's (PMO).

The Gate Approval Process guidelines can be found at <<<http://www.epmo.scio.nc.gov/whatsNew.asp>>>

As you can see these documents are tailored for different levels of users of the PPM tool.

Help provide feedback!
We would love for you to use these documents as you do your gate approvals. Please let us know if the make the process easier to follow.

Improvement Areas for Second Quarter

EPMO Improvement Plan
Future PPM Tool Direction
Web Site Improvements

Best Practice Question

What is an IT project?

New or enhanced functionality to hardware, software or IT services.

Temporary endeavor with a start and finish.

Creates a product or service.

Legislative Requirements

All IT projects with project cost + 5 years operations and maintenance \$100,000 or greater are subject to the State CIO Project Approval process.

Important Links

We made some minor improvements to the EPMO web site. There is a "what's new" section as well as this quarterly newsletter.

EPMO Web Site

<<<http://www.epmo.scio.nc.gov/>>>

Project Approval and Reporting

<<<http://www.epmo.scio.nc.gov/ProjectApprovalsAndReporting.asp>>>

PPM Tool

<<<https://www.ppm.state.nc.us/UMTNC/Login.aspx?Path=%2fUMTNC%2fDefault.aspx>>>

Program Management

A program is a group of projects which are inter-related and require close coordination.

What are the benefits?

Program management allows a PMO to look at costs and benefits across the program, understand cross-project dependencies and schedules, view the status of all projects in a program,

understand total impact of change requests and identify risk or issues that impact multiple projects.

How will it work?

The agency's internal PMO will work with their PMA to design the program. Once approved as a program, the internal PMO will create and manage the program in the PPM tool. All projects related to the program will

go through the gate approval process even if below the \$500,000 threshold. (This is important as even a small project may be a critical dependency for a larger project).

Link Program Management <<http://www.scio.nc.gov/documents/docs_PortfolioManagementInitiative/PPM%20Tool%20Program%20Management%20Process.pdf>>

Change Request Process - Clarified

Cost, schedule or scope of projects can change.

Perhaps at the beginning of the project your team could only estimate the project cost and schedule. As your project is designed and RFP's are completed you have realistic costs,

schedule and scope.

What's being clarified? It is often unclear in the Change Request Process when to do a change request and what documentation is needed for approval.

Where to find information?

Look in Project Approval Process document, Section 4, at this link

<<http://www.scio.nc.gov/documents/docs_PortfolioManagementInitiative/ApprovalProcess.pdf>>

PPM tool – Updates for 1st Quarter 2008

New Fields on Status tab

Initiation Phase Hours
Closeout Phase Hours

So you can account for all project hours

Schedule tab label changes

Added word 'Key Deliverables' to 'Milestones'

Helps project managers identify project deliverables

Schedule tab label changes

'Actual Start' and 'End Date' changed to 'Planned Start Date' and 'Planned End Date'

'Actual' to 'Actual % Complete'

3 Common PPM tool mistakes

1) Forgetting to provide milestones/deliverables

Each month you should have one or more deliverables that help show project progress. Put the deliverables into the **schedule tab and on the status tab** (under accomplishments and plans).

2) Incomplete issues

When an issue/risk is created for your project **you must be sure to complete all information**, especially owner of the issue and due date. You **must provide an answer to the issue or explain any progress made toward the issue each month** until the issue is closed.

3) Phase to Date Plan Hours

Remember these are **PHASE** hours both actual and planned for both the month and **PHASE** to date. The tool won't add up phase to date totals, you will need to do that. Also, when you enter a new phase of your project, please zero out the previous month to date phase actual and planned hours.